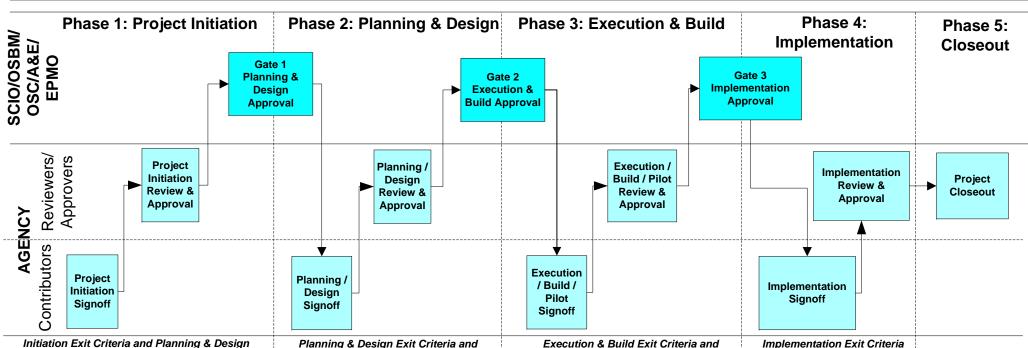
# State of North Carolina PPM Workflow for Projects > = \$500,000

Investment Cost = Project Cost (Initiation thru Closeout Phase) + 5 years Operations



## Initiation Exit Criteria and Planning & Design Entrance Criteria **SCIO REQUIRED**

# **Project Information Section**

Project Charter

Business Issues High Level Assumptions / **Business Goals** Constraints

Project Goals Key Dependencies external

Project Deliverables to the project Items Out of Scope Project Organization and

Proposed Strategy Roles

## **Additional Requirements**

Initiation Phase & Planning Phase Cost

**Budget Information Section** 

Enterprise Architecture Questionnaire

Security Questions

Project Manager Interview (Completed by EPMO)

Proposed Budget - Level 1 Budget Cost Tab

Financial Benefits - Level 1 Benefit Tab

Alternative Analysis if over \$10M investment cost

Business Driver Impact Statements - Strategic Impact Tab

Summary Risk Profile - Risk Tab

Procurement Plan

Planning & Design Phase Milestones and Key Project Deliverables

Planning and Design Phase Staffing Plan

# Planning & Design Exit Criteria and Execution & Build Entrance Criteria **SCIO REQUIRED**

Updated Roles/Responsibilities

Updated High Level Assumptions / Constraints Updated Key Dependencies external to project Significant Issues / Risks - Issues & Risks Tab

Project Schedule / Milestones

Budget Cost - Levels 3 & 4 Budget Cost Tab Financial Benefits - Level 2 Benefit Tab

Preliminary System Design Document

Project Status Reporting

Plan vs. Actuals

Updated Business Case - Project Charter, Budget, Benefits Estimate, Strategic Impact,

Risk, Schedule, Cost Tracking Staffing Plan

Approved Business Requirements Document

**Updated Budget Information Section** 

**Updated Security Questions** 

Monthly Status Reports Current

# Budget, Scope and Schedule (Triple Constraints)

#### are Baselined **AGENCY DOCUMENT CHECKLIST\***

Proiect Plan Communication Plan

Change Mgmt Plan Configuration Mgmt Plan Project Test Plan

Acceptance Criteria Quality Assurance Plan Statement of Work (SOW)

Work Breakdown Structure (WBS)

Updated Procurement Plan Training Plan

Deployment / Rollout Plan

Risk

Management Plan

# Implementation Entrance Criteria **SCIO REQUIRED**

Updated Roles/Responsibilities Updated High Level Assumptions / Constraints Updated Key Dependencies external to project Updated Significant Issues / Risks - Issues / Risk

Updated Detailed System Design Document Updated Project Schedule / Milestones Updated Budget Cost - Levels 3 & 4 Budget Cost

Updated Financial Benefits - Level 2 Benefit Tab **Project Status Reporting** 

Updated Business Case - Project Charter, Budget, Benefits Estimate, Strategic Impact,

Risk, Schedule, Cost Tracking

Plan vs. Actuals **Updated Budget Information Section** 

**Updated Security Questions** 

Monthly Status Reports Current Updated Staffing Plan

Sponsor's Approval of User Acceptance Criteria

#### **AGENCY DOCUMENT CHECKLIST\***

Disaster Recovery/Business Continuity Plan Test and Acceptance Results Pilot Results

Operations & Maintenance Transition Plan

Agency documents may be attached in **Document Management tab** 

# Implementation Exit Criteria & Closeout Entrance Criteria **SCIO REQUIRED**

Project Status Reporting Plan vs. Actuals Updated Significant Issues / Risks - Issues / Risk Tab Update Budget Information Section

**Update Security Questions** Monthly Status Reports Current

**Update Agency Applications** Portfolio as required (APM)

# **EPMO QA** REQUIRED

Project Closeout Review

# **AGENCY DOCUMENT CHECKLIST\***

Lessons Learned Historical Records

**Project Status Reporting:** >= \$500K = Monthly Status Reporting

> Version 3.3 06/27/2008